

# HERITAGE POINTE *Pointe of View*

*Seniors Living in the Jewish Tradition*

Fall 2014/5775

## 25<sup>th</sup> Annual Gala Honors Visionary Leaders! Celebrate at Our Winter Wonderland on December 7

Orange County Jewish Heritage Friday, April 10, 1987

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**HERITAGE POINTE** — Meryl Schrimmer, left, and Loretta Modelevsky are with Dr. Leon Schwartz, Dr. Tom Cesario and Dr. J. Edward Berk at recent open meeting for the proposed Jewish Home for the Aging of Orange County.



### Special Honorees

#### Our Founders

Meryl Schrimmer and Loretta Modelevsky

#### Our Board Chairmen

Meryl Schrimmer, Victor Klein\*,  
Mel Lipson, Denny Denkensohn,  
Richard Katz, Leo Pinsky, Fred Forster,  
Bill Klein, Lawrence Rael,  
Bonnie Jeannette, Cindy Mirsky

#### Our Advisory Board

Irving Burg, Denny Denkensohn,  
Allan Fainbarg, Arnold Feuerstein, Fred Forster,  
Dr. Richard Katz, William Klein, Victor Klein\*,  
Allen Jaffy\*, Nira Kozak Roston\*, Gary Kramer,  
Dr. Mel Lipson, Isidore Myers\*, Leo Pinsky,  
Henry Schrimmer, Meryl Schrimmer,  
Ralph Stern, Chela Taleisnik, Ira Victor

\*Of Blessed Memory

Heritage Pointe's 25th Annual Gala on Sunday December 7, 2014 will honor our Founders, Board Chairmen and Advisory Board. Their vision, leadership and dedication inspired us to become a nationally known, vibrant Jewish retirement community.

Celebrate with us. Enjoy our Winter Wonderland at the Hotel

Irvine, dance to the music of Wayne Foster Entertainment, dine on gourmet kosher cuisine catered by Blueberry Hill, surrounded by friends and our proud community.

Our 25th Annual Gala will kick off our 25th Anniversary Celebrations throughout 2015 as we join together to mark our Silver Anniversary of serving seniors.

Jane Fischel and Allison Pinsky, Gala Chairs, encourage you to be involved, join the Gala committee and reserve your tables now. Ticket prices begin at \$300 with Patron levels starting at \$500. To learn more, contact Pamela Davis, Director of Events and Special Projects: 949-364-0010.

*By staff writer Debby Polonsky*



# Lugano Diamonds Will Host Pre-Gala Patron Party November 2nd



Moti and Idit Ferder of Lugano Diamonds

Lugano Diamonds will graciously host our Pre-Gala Patron Party in their salon and vault in Fashion Island, Newport Beach, on Sunday evening, November 2nd. Lugano Diamonds is excited to partner with Heritage Pointe. With luxury salons located in Newport Beach and at Montage Laguna Beach, Lugano

provides guests with an experience as unparalleled as its exquisite collection of magnificent gems and custom designed jewelry including spectacular rings, bracelets, necklaces, brooches, earrings and cufflinks. Heritage Pointe Gala Patrons will have the unique opportunity to view Lugano Diamonds original designs and collections, enjoy a cocktail reception, become educated on the rare gems and shop that evening with 10% of the sales donated to Heritage Pointe. Our hosts also generously donated a stunning piece of jewelry as a special opportunity drawing in celebration

of our 25th Annual Gala. The winner will be announced at the Gala. Everyone is welcome to purchase opportunity tickets, but a limited number will be sold. We are delighted and honored to partner with Lugano Diamonds.

Funds raised at the Gala celebration support the Heritage Fund, which assists residents in financial need, as well as enriches and enhances all our residents' lives.

The entire community is invited to join the celebration, as we proudly salute our past and look enthusiastically to the future. For further information, please contact Pamela Davis, Director of Events and Special Projects, at Heritage Pointe: 949-364-0010.



LUGANO®  
DIAMONDS



# Residents Enjoy Annual Senior Prom King and Queen Crowned



Queen Marcia Kaplan and  
King Paul Davis



Left to right, Lillian Paillet and Mimi Schoenberg



Left to right, Phyllis Goldhamer and Rita Schaffel



Left to right, Gitta & Homer Chernin  
and Rita & Morris Ossias



Bob & Judith Rosenberg



Rabbi Joe and Linda Mendelsohn



Ollie Ross and Lew Goodman



Mike Terkel and Marcia Kaplan



# Jodi Greenbaum Named Chairman of the Board



Jodi Greenbaum

Jodi Greenbaum has dedicated her life to helping others. Now the focus of this dedication has become nurturing the “beloved” residents of Heritage Pointe as the new Chairman of the Board of Directors. Her mantra: “Every decision made is for the benefit of the residents.”

She was so thrilled and thankful for the wonderful care her father-in-law received at Heritage Pointe during his three-and-a-half years as a resident, that it motivated her to serve first on one of Heritage Pointe’s task forces and then to join the Board of Directors. “When issues arise at meetings,” she said, “the foremost question is always ‘how will this affect residents.’”

Jodi’s major projects for this year are updating the apartments and campus life.

## Lifelong Learning Center

Jodi also envisions a lifelong learning center for residents; involving and engaging them to influence a part in its development, nurturing them to be involved in all personal growth. “Whether 8 or 108,” she described, “I like them to be committed to growing. I want them to feel significant and important. We

hope to invite lecturers, teachers and educators to enhance the program in a myriad of subjects: philosophy, literature, history, science, music and aspects of health,”

## A History of Community Service

Jodi has a history of Orange County community service. Her volunteerism germinated as a member of the Jewish Federation and Family Services Board, ultimately serving as president, culminating with serving on the Board of Tarbut v’ Torah when her three children attended the Jewish day school there. Her children accompanied her doing volunteer work, and continue to assist in decorating Heritage Pointe’s Sukkah and singing to the residents on holidays.

Raised in a family that could not afford to offer a Jewish education, while Chairman of JFFS Jodi spearheaded Passports to Jewish Life which helps young people pursue Jewish experiences and learning, and Reading Partners, which sends volunteers into local schools. “It’s the leadership of people like Ann Moskowitz with Passports, Ellen Weiss with Reading Partners and the army of volunteers that have allowed both these learning programs to thrive and grow,” said Jodi. “We’re hoping that our new emphasis on learning will enable us to also offer exciting opportunities for seniors living in Heritage Pointe and the community.”

## Degree in Communications

Jodi grew up in Huntington Beach, attending Fountain Valley High School. With a degree in communications from Cal State

Fullerton, she became a free-lance journalist, interning at the “The Register”, then working for “The Daily Pilot” and becoming editor of the “Society Magazine”. At present, she confides, she is writing a young adult novel.

Daughter Leah, 24, works for a synagogue in St. Louis, where she has developed a Dor v’ Dor volunteer program. Carter, 23, attends Yale Law School (surreptitiously writing a thriller novel), and Reva, 16, studies at Tarbut V’ Torah. Husband Martin is a Newport Beach attorney.

As a special project for enriching her life, Jodi is presently helping to develop Dream Makers, a program for women and friends. She describes it as “doing three things you really want to do, doing something fun and helping others.” She also partners with many organizations in the community.

By staff writer Judy Florman

## Pointe of View Staff

Pointe of View is published quarterly by the Heritage Pointe Development Department, Pamela Davis, and the following volunteers:

Martin Brower  
*Managing Editor*

Judy Florman  
Debby Polonsky  
Meryl Schrimmer

Valerie Sloane

POV



# Diamond Donors Barbeque

## Heritage Pointe Setting, Tasty Food, Fun Dancing



*Allison and Leo Pinsky*



*Left to right, Roz Portnoy and Polly Sloan*



*Martin and Tamar Brower*



*Left to right, Sue Goldstein, Leba Kramer, Julio & Chela Taleisnik*



*Left to right, Les & Sue Goldstein, Karen & Bruce Harris, Sharon & Ken Kraus*



*Left to right, Fred Forster, Art Friedman, Bruce Harris, Ira Victor*

DIAMOND DONORS support Heritage Pointe with an annual donation of \$1000 or more. To date, the group has raised more than 2 million dollars to support residents in need of financial assistance.

JOIN DIAMOND DONORS TODAY. Call Ellen Weiss, Director of Community Engagement and Philanthropy: 949-364-0010.



# Meet Heritage Pointe's Youngest Residents

## Silvers Find Heritage Pointe Lifestyle Ideal



*Richard and Betsy Silver, ages 72 and 65.*

"Where will I live when I start to need help with the daily business of living? I don't want to wait for my children to open 'the conversation' in carefully casual tones. I want to start that conversation myself." So begins an article in a recent issue of the "AARP Bulletin."

And that concept is what inspired Richard and Betsy Silver, ages 72 and 65, both in good physical and mental health, to move to Heritage Pointe last October.

"We liked the idea of moving on our own terms, to decide where we want to live and not to burden our children with that decision," said Betsy. "We were looking for an easier lifestyle," added Richard, who spurred the move.

And how do the Silvers like their decision thus far? "We love it here," both chimed in. The Silvers enjoy having three meals per day prepared for them, "we can engineer our own meals, there are so many choices," Betsy said. They work out every morning beginning in their own apartment and then going to Heritage Pointe's well-equipped fitness center; they take part in the many and varied activities offered

during the day; and they enjoy meeting all of the residents. "Every resident has an interesting story to tell," Betsy stated.

### **Retired Teachers, They Are Teaching at Heritage Pointe**

Moreover, the Silvers—both retired school teachers—have taken on teaching at Heritage Pointe. They are orchestrating the Optimizing Brain Fitness program and are a part in the Great Courses Program. They are also becoming involved in the new Mitzvah Corps and are looking into participating in a proposed resident newsletter.

They also enjoy their sunny, two-bedroom, nicely furnished and decorated apartment. Betsy admits that moving to an apartment from their Irvine home of almost 40 years was not an easy task, deciding which furnishings and collections they would keep. But she also feels that doing so now, rather than waiting for her children to make the decision, was the right thing to do.

Not that the Silvers, at their relatively young ages, are stay-at-home individuals. They have a car and travel to see their two daughters—

Lora, who is married and lives in Oakland, and Lisa, who is married and lives in Encino—among other driving trips. "I like that we can lock up our apartment and go without any worries," offered Richard.

### **Los Angeles Natives Move to Irvine**

Richard and Betsy are both Los Angeles natives. Richard went to Hamilton High School, Santa Monica City College and USC; Betsy went to Fairfax High School and UCLA, earning a masters degree and a teaching credential. Richard, after service in the U.S. Army during Vietnam and working for the County of Los Angeles in social service, went back to school for his masters degree and a teaching credential. They met at a wedding for mutual cousins.

In 1975 the Silvers moved from Los Angeles to a home in the then-new city of Irvine and became members of Chabad of Irvine and later members of Temple Bat Yahm in Newport Beach. They lived in their Irvine home, which they sold, until their move to Heritage Pointe. During many of those years, Richard commuted to Montebello to teach and Betsy substituted in Irvine for over 20 years.

Through the years, the Silvers knew of Heritage Pointe, but they really fell in love with the home for senior living when Betsy's aunt became a resident and they visited her regularly. "When we made the decision to move to Heritage Pointe, we were both committed to make the move work, and we have adapted quite well," Betsy concluded.

*By staff writer Martin Brower*



# Chicago Residents, Families Form Club



Left to right: Bernice Stokols, Shari Raskin and Henry Stokols



Left to right: Irene Jacobs and Nanette Minnow

Heritage Pointe has a new social club, thanks to the daughters of residents who met by chance at the Home's front desk. Shari Raskin, daughter of Bernice and Henry Stokols, recognized the regional accent of a fellow Chicagoan, Nanette Minnow, daughter of Irene Jacobs. Shari introduced herself and finding much in common with Nanette, they soon became good friends.

Both of their parents were living at Heritage Pointe for only a few months. The idea of forming a club for former Chicago residents occurred to Shari. Nanette was happy to help with the planning and formation of a Chicago club, knowing it would be an enjoyable way to bring people with similar experiences together. The club was an immediate success.

## Each Meeting Has a Theme and a Surprise Treat

The daughters plan a theme or activity, and a surprise treat for the meetings. The group meets on the

third Wednesday of each month. Themes run the gamut from topics of Chicago trivia, Chicago nightlife, the shady and funny side of Chicago to famous people and inventions originating in Chicago.

Did you know the first open heart surgery was performed in Chicago? Cell phones were invented in Chicago and speciality food products that are part of America's DNA like Crackerjacks, Tootsie Rolls, Brownies and Sara Lee cheesecake were all created there.

## Sharing Stories, Acquaintances

Twenty or more residents attend the monthly meetings. They enjoy sharing stories about growing up in Chicago, or life in Skokie and other areas once known as the centers of Jewish life. Everyone has a memory to share, or an acquaintance in common with another Heritage Pointe resident.

A highlight of each meeting is the awarding of a raffle prize. It could be a mug imprinted with

the city skyline, a book about the "Windy City" or a box of Frango mints, shipped directly from Marshall! Fields, Chicago's famous department store. Most importantly, everyone leaves the meeting smiling from a good time.

## Similar Clubs Can Be Formed

Shari and Nanette bring fun, friendship and frivolity to the lives of our seniors. What a wonderful gift! Heritage Pointe hopes the Chicago Club will be an inspiration to other volunteers as a way to enrich the residents' lives. How about a New York club for people from the "Big Apple" or maybe a German club? Loretta Modelevsky, Heritage Pointe's Volunteer Coordinator or Carol Pottak, Activities Assistant, will be happy to help launch another regional club. Give Loretta or Carol a call if you would like to be involved in a similar project at (949) 364-9685 extension 1936.

*By staff writer Meryl Schrimmer*



## Save These Dates!

**Sunday, November 2, 2014**

Annual Pre-Gala Patron Party

Lugano Diamonds,  
Fashion Island, Newport Beach



**Sunday, December 7, 2014**

25th Annual Gala

Hotel Irvine

Catering by Blueberry Hill  
Jane Fischel and Allison Pinsky  
Gala Co-chairs



**Sunday, March 1, 2015**

Diamond Donor  
Appreciation Dinner

Newport Beach  
Marriott Resort & Spa



**Tuesday, April 28, 2015**

25th Annual Luncheon  
and Boutique  
Hotel Irvine

## Let's Have Lunch!

Heritage Pointe offers something unique and vital—friendships. “Socialization is second only to good nutrition as a contributor to a healthy and fulfilling life,” said Mary Julienne, Heritage Pointe’s Administrator. She encourages moving to Heritage Pointe while seniors are still physically able to partake of its many stimulating benefits.

### **Myriad Benefits Await Residents**

Benefits for residents include exercise, life enrichment, educational programming, religious services, field trips, resident-created men’s and women’s discussion groups, a Mitzvah Corps, and, of course, Mah Jong and Bridge games. “Friendships are built and sustained through participation with others in our resident community,” Mary said.

Heritage Pointe welcomes adult children of potential residents to

take tours and enjoy a nutritious Kosher lunch, with or without their parents on the first visit. Once the choice to live at Heritage Pointe is made, a beautiful, private apartment awaits together with lasting friendships!

### **Begin Move-in Process Well in Advance**

“Moving to Heritage Pointe is exciting. Take the time to be sure all your questions are answered to guarantee a smooth transition,” said Liz Currie, Marketing Representative. Everyone out in the Jewish community is an ambassador for Heritage Pointe and a member of the marketing team. Let’s get the word out about living at Heritage Pointe!

Let’s Have Lunch! Make a date with Liz at (949) 364-9685.

*By staff writer Valerie Sloane*

## Writers Wanted

Would you like to be a volunteer staff writer for the quarterly “Pointe of View” newsletter? Our fun-loving staff is looking for one or two additional writers/reporters. No professional experience is necessary, merely the desire to write about the residents and activities taking place at Heritage Pointe.

We meet only four times each year at one of our staff’s homes, decide on the contents of the next issue while enjoying refreshments, then volunteer for an assignment for the next issue.

Interested? Call Managing Editor Martin Brower at (949) 640-5228 or e-mail him at [MandTBrower@cox.net](mailto:MandTBrower@cox.net).



# The Heritage Fund Provides New Ways to Donate

As Heritage Pointe celebrates its 25th anniversary serving seniors, it is expanding its fundraising approach. From the beginning, community donations have been primarily directed to the Resident Assistance (or Scholarship) Fund. Now the recently established Heritage Fund broadens the scope of giving in the following ways:

- In addition to assisting residents in financial need, donations may be designated toward special projects and programs including lifelong learning experiences for residents or to purchase a special piece of equipment such as a yogurt machine.

## Potential for Yearly Pledges

- Donors will be able to make yearly pledges in small or large dollar amounts.

"Similar to Diamond Donors, supporters can make an annual donation in all amounts" said Ellen Weiss, Director of Community Engagement and Philanthropy.

- Funds raised can now be used to benefit all of the residents, not just the 20 percent whom, for 25 years, have been so generously helped by the community to defray room and board costs.

"As the Board of Directors moves forward to continually enrich and enhance our seniors' lives, new projects—as well as resident assistance—can be funded through The Heritage Fund," Ellen said.

## Mail Solicitations

"From the many contributions we receive—both solicited and unsolicited—we know there are people who want to make Heritage Pointe a consistent part of their personal philanthropy in a meaningful way. With The Heritage Fund direct mail solicitations, we hope to reach a larger base than the core who join support chapters, purchase tributes and attend our fund raising events," she added. Ellen welcomes calls (949) 364-0010 from anyone wanting more information.

*By staff writer Valerie Sloane*

To make a donation, visit our website: [www.heritagepointe.org](http://www.heritagepointe.org)

Jewish Home for the Aging of Orange County

## Heritage Pointe Board of Directors

### Board of Directors

Jodi Greenbaum  
*Chairman*

Cindy Mirsky  
*Immediate Past Chair/  
Parliamentarian*

Rod Stern  
*VP, Governance*

David Susson  
*VP, Finance & Treasurer*

Beth Slavin  
*VP, Development*

Bonnie Jeannette  
*VP, Building & Facilities*

David Zarnow  
*VP, Spiritual Life*

Jane Fischel  
*Secretary*

Steven Fainbarg  
Roberta Feuerstein

Lauren Klein

Jon Kline

Toni McDonald

Allison Pinsky

Wayne Schwartzman

Charlene Zuckerman

### Advisory Board

Irving X. Burg

Denny Denkensohn

Allan Fainbarg

Arnold Feuerstein

Fred Forster

Dr. Richard Katz

William Klein

Gary Kramer

Mel Lipson

Leo Pinsky

Henry Schrimmer

Meryl Schrimmer

Ralph Stern

Chela Taleisnik

Ira Victor



# OC Legacy Society Includes Heritage Pointe Donors

On November 16th, the Jewish Community Foundation will host the 2nd Annual Endowment Book of Life community signing event to recognize area donors who have made a commitment to honor Heritage Pointe in their estate plans and/or other organizations who are part of the "Life & Legacy Program".

Proudly, we have many donors, like you, who want to secure the future of our Home for generations

of seniors to come. We honor these donors by name on our Legacy of Caring Wall at Heritage Pointe. Now, our donors and others will be included in the Orange County Legacy Society as well.

If you have previously made a Legacy Gift to us, thank you! We accept gifts of cash, appreciated stock, charitable gift annuities, life insurance policies and other bequests. Should you wish to update

your gift or as new donors create one, please contact Ellen Weiss, Director of Community Engagement & Philanthropy: 949-364-0010.

We are delighted and honored to include you on our Legacy Wall and as signers of the community Endowment Book of Life.

**CREATE A SWEET TODAY...  
AND A SWEET TOMORROW.**



This year consider leaving a gift  
to Heritage Pointe  
in your will or trust.

**What will your legacy be?**

**To create your Jewish Legacy contact:**

Ellen Weiss  
Director of Community Engagement & Philanthropy  
Heritage Pointe  
(949) 364.0010  
[eweiss@heritagepointe.org](mailto:eweiss@heritagepointe.org)  
[www.heritagepointe.org](http://www.heritagepointe.org)



Life & Legacy program and the Life & Legacy Logo are trademarks of the Harold Grinspoon Foundation. All rights reserved.



# Mary Julienne Shares Heritage Pointe News



September and autumn are upon us and Labor Day puts vacation in the rear view mirror for many of our families with younger children or grandchildren. We've had some marvelous events both inside and out this summer and we will end the season with our Labor Day BBQ. Summer is winding down and we are heading into the High Holydays.

National Assisted Living week is September 7th – 13th and this year's theme is "The Magic of Music." Myra Rubin, our Director of Activities, is planning our annual Staff Variety Show which will be held on the 30th of September. The excitement at Heritage Pointe is related to the many new resident centered and resident created programs, games, entertainment and projects

including the newest Mitzvah Corps, residents assisting residents.

There are also a number of improvements in the works at Heritage Pointe as we get ready to celebrate 25 years of excellence! Those attending the Annual Spring Luncheon saw hard hats on the runway and the design proposals for apartment remodels. This project is in the planning stages. There will also be a major Health Care expansion to meet our community's needs and some interior beautification in our public areas including our Synagogue. We will soon have our emergency generator on site to power the entire community in the event of a power outage.

Recently, we submitted a story about one of our residents in a talented senior search conducted by a national referral agency. Ziggy Silbert was featured! ([www.aplaceformom.com](http://www.aplaceformom.com)) There are so many talents under our roof—it will be fun to select the next one. Each year we have at least one resident turn 100 and we have several who have surpassed up to our eldest at 107! Here's to a long and healthy life to all!

## Heritage Pointe at Home

Heritage Pointe at Home is a non-medical home care agency designed to serve seniors in the privacy of their own home or within a licensed senior community.

Call Kelli Denton to schedule an assessment at 949-364-1489



## Heritage Pointe's Management Staff

Mary Julienne  
*Administrator*

Ellen Weiss  
*Director of Community  
Engagement & Philanthropy*

Pamela Davis  
*Director of Events &  
Special Projects*

Myra Rubin  
*Director of Activities*

Cantor Susan Deutsch  
Phylliss Levenson  
*Front Desk Supervisor*

Sherry Bates  
*Director of Human Resources*

Mariam Tawfik  
*Director of Healthcare Services*

Patti Gardner  
*Memory Care Manager*

Rob Sands  
*Chef Manager*

Valerie Moncrief  
*Dining Room Manager*

Loretta Modelevsky  
*Volunteer Coordinator*





Jewish Home for the Aging of  
Orange County

27356 Bellogente  
Mission Viejo, CA 92691



Tel: (949) 364-9685  
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Time Dated Materials

# HERITAGE POINTE 25<sup>th</sup> ANNUAL GALA *Winter Wonderland*

HONORING OUR FOUNDERS, PAST BOARD CHAIRMEN  
AND ADVISORY BOARD

**SUNDAY, DECEMBER 7, 2014**

HOTEL IRVINE

6 O'CLOCK IN THE EVENING

GALA CHAIRS – JANE FISCHER & ALLISON PINSKY  
DINNER & DANCING TO WAYNE FOSTER ENTERTAINMENT

CONTACT THE DEVELOPMENT DEPARTMENT FOR  
FURTHER DETAILS AT 949.364.0010 OR VISIT  
[WWW.HERITAGEPOINTE.ORG](http://WWW.HERITAGEPOINTE.ORG)



**HERITAGE POINTE**  
Seniors Living in the Jewish Tradition



# Before You Leave...

## THE 25 ESTATE DOCUMENTS YOU NEED TO PUT IN ONE PLACE\*

### The Essentials

- Will
- Letter of Instruction
- Trust Documents

### Marriage and Divorce

- Marriage License
- Divorce Papers

### Health-Care Confidential

- Personals and Family Medical History
- Durable Health-Care Power of Attorney
- Authorization to Release Health-Care Information
- Living Will
- Do-Not-Resuscitate Order

### Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage Accounts
- Proof of Loans Made and Debts Owed
- Vehicle Titles
- Stock Certificates, Savings Bonds and Brokerage Accounts
- Partnership and Corporate Operating Agreements
- Tax Returns

### Life Insurance and Retirement

- Life Insurance Policies
- Individual Retirement Accounts
- 401(k) Accounts
- Pension Documents
- Annuity Contracts

### Bank Accounts

- List of Bank Accounts
- List of all User Names and Passwords
- List of Safe-Deposit Boxes

\*From Sabrina Chaudhuri's 7/2/2011 article in the *Wall Street Journal*



Development Department 949.364.0010

27356 Bellogente - Mission Viejo, California - [www.heritagepointe.org](http://www.heritagepointe.org) - Tax ID 33-0260314





## Create a Jewish Legacy LETTER OF INTENT



In the tradition of our Jewish faith, I wish to share my blessings by declaring my intent to provide for the needs of future generations.

**It is with deep satisfaction that:**

- ☐ I have made a provision  
☐ I shall make a provision during the next \_\_\_\_\_ months

**I wish to support the following Orange County institutions: (check all that apply)**

- |  |   |
|--|---|
| <input type="checkbox"/> Beth Jacob Congregation of Irvine | <input type="checkbox"/> Jewish Federation & Family Services OC |
| <input type="checkbox"/> Bureau of Jewish Education OC     | <input type="checkbox"/> Tarbut V'Torah                         |
| <input type="checkbox"/> Community Scholar Program         | <input type="checkbox"/> Temple Bat Yahm                        |
| <input checked="" type="checkbox"/> Hebrew Academy         | <input type="checkbox"/> Temple Beth El                         |
| <input checked="" type="checkbox"/> Heritage Pointe        | <input type="checkbox"/> Other _____                            |

**with a legacy gift or endowment fund established through a:**

- |  |   |
|--|---|
| <input type="checkbox"/> Bequest in my will or trust                       | <input type="checkbox"/> Life Insurance Policy      |
| <input type="checkbox"/> Remainder of IRA and other retirement plan        | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Gift of real estate, securities or other property | <input type="checkbox"/> Donor Advised Fund         |
| <input type="checkbox"/> Charitable Gift Annuity                           | <input type="checkbox"/> Other _____                |

**Privacy Statement:** To encourage others to make commitments to the future we occasionally list names in printed materials and/or on our website.

- ☐ I permit my name to be listed in printed materials. \_\_\_\_\_  
☐ I prefer to remain anonymous. *My name should appear as* \_\_\_\_\_

Name(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I understand that this letter of intent is not a legal obligation and may be changed at my discretion at any time.

Signed \_\_\_\_\_

Date \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_

The Jewish Community Foundation's professional staff can assist in creating endowed gifts. Please contact us with any questions or to establish your legacy. Together, we guarantee a Jewish tomorrow.

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Jewish Community Foundation Orange County  
1 Federation Way, Suite 210  
Irvine, California 92603  
949.435. 3490 www.jcfoc.org info@jcfoc.org